

**Department of Aging**  
**Intrastate Funding Formula (IFF) Summary**  
September 29, 2010

The following is a summary of allocation methodology used to determine the initial allocations at the start of a new State Fiscal Year. The total amount of the current federal award is used as the estimate of funds to be allocated.

**1. Start with an estimated Federal Fund Total.**

**2. Pull State Operations amount off the top.**

Take 5% off the top of the estimated Federal Fund Total for State Operations; and, then remove \$600,000 of that amount and put it into the Local Assistance Pot. (A legislative directive requires CDA to contribute \$600K out of its 5% share back to Local Assistance.)

**3. Take out Ombudsman program funding.**

From Title IIIB, set aside \$2.1 million for the Ombudsman Program (\$889K State Ops & \$1.2 million Local Assistance)

**4. Calculate Amount to set aside for Local Area Administration.**

Set aside 10% of Local Assistance Pot to allocate to AAAs in a separate step for their Local Area Administration.

**5. Allocate Federal Local Assistance, including year Federal Fiscal Year 2000 test.**

Allocate Federal Funds Titles IIIB (non Ombudsman), IIIC1, IIIC2, and IIIE via specifically weighted IFF factors (60+ Low Income, 60+ Minority, 60+ Geo Isolated, 60+ Non-Minority), ensuring that every PSA meets the Federal Fiscal Year 2000 federal funding level for the combined total of Titles IIIB, IIIC1 and IIIC2. Allocate IIID by an adjusted factor which includes a component based on each PSA's relative number of 60+ MediCal eligibles.

[Note: The 2000 test works so that PSAs falling below their Year 2000 level are brought up to that 2000 level and then excluded from further allocation. The IFF then redistributes the remaining funds based upon the relative factors of the AAAs that did not fall below the test.]

**6. Allocate Local Area Administration.**

Determine how much each PSA should get out of the total Local Area Administration Pot by giving each a \$50,000 base and then running the rest of the funds through a formula based on each PSA's relative proportion of 60+. Then split each PSA's Local Area Administration into the program categories.

[Note: The Local Area Administration Pot consists of State GF in a fixed amount every year combined with the 10% of federal local assistance funding set aside in #4, above. The Admin for each PSA is split between program categories by applying the same percent-to-total as they have program funding.]

**7. Allocate 5% State General Fund match.**

State General funds for local assistance are appropriated only to the IIIC1 and IIIC2 programs, but the 5% match amount is allocated to match programs IIIB (non-Ombudsman), IIID and VII (Elder Abuse Prevention) as well.

**8. Allocate "Overmatch" to meet Maintenance of Effort (MOE)**

Use the General Funds left over after the 5% allocation to bring every PSA up to their prior year's Original Contract funding level for IIIB (non-Ombudsman), IIIC1, IIIC2, IIID and Title VII (Elder Abuse Prevention) combined. Only PSAs that fall below MOE levels get "overmatch".\*

**9. Apply "Surplus Overmatch" to PSAs below "1984-85 Hold Harmless" level.**

Test to see if any PSA's total funds are below their "1984-85 hold harmless" level and, if so, take funds off the top of the remaining State General Funds ("Surplus Overmatch") to bring them to that level.

**10. Distribute remaining "Surplus Overmatch" to the rest of the PSAs via the Washington Formula.**

[\*NOTE: *If no General Fund is left over after MOE distribution*, any PSA whose total funds are below their 1984-85 hold harmless level, must be "backfilled" by pulling from each PSA's distributed "overmatch" in Step 9 by a %-to-total calculation until all PSAs meet their 1984-85 hold harmless level. ]